

Form **8821**

(Rev. January 2021)

Department of the Treasury
Internal Revenue Service**Tax Information Authorization**▶ Go to www.irs.gov/Form8821 for instructions and the latest information.

▶ Don't sign this form unless all applicable lines have been completed.

▶ Don't use Form 8821 to request copies of your tax returns
or other documents that you did not prepare for the IRS to send you. See instructions.

OMB No. 1545-1165

For IRS Use Only

Received by:

Name

Telephone

Function

Date

1 Taxpayer information. Taxpayer

Taxpayer name and address

Type client's name
and address here

6.

Taxpayer identification number(s)

SSN goes here

Daytime telephone number

Plan number (if applicable)

2 Designee(s). If you wish to name more than two designees, attach a list to this form. **Check here if a list of additional designees is attached** ▶ ☐

Name and address

Jo-Anne Taylor Willetts
501 N. Cattlemen Road, Suite 300
Sarasota, FL 34232**Check if to be sent copies of notices and communications** ☐

CAF No.

PTIN P00140683

Telephone No. 941-724-4220

Fax No. 336-419-0485

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

Name and address

Chianti Monique Josey
501 N. Cattlemen Road, Suite 300
Sarasota, FL 34232**Check if to be sent copies of notices and communications** ☐

CAF No.

PTIN P02265647

Telephone No. 941-315-3758

Fax No. 336-419-0485

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐**3 Tax information.** Each designee is authorized to inspect and/or receive confidential tax information for the type of tax, forms, periods, and specific matters you list below. See the line 3 instructions.☒ By checking here, I authorize access to my IRS records via an Intermediate Service Provider.

(a) Type of Tax Information (Income, Employment, Payroll, Excise, Estate, Gift, Civil Penalty, Sec. 4980H Payments, etc.)	(b) Tax Form Number (1040, 941, 720, etc.)	(c) Year(s) or Period(s)	(d) Specific Tax Matters
income	1040	2019-2020	n/a

4 Specific use not recorded on the Centralized Authorization File (CAF). If the tax information authorization is for a specific use not recorded on CAF, check this box. See the instructions. If you check this box, skip line 5 ▶ ☐**5 Retention/revocation of prior tax information authorizations.** If the line 4 box is checked, skip this line. If the line 4 box isn't checked, the IRS will automatically revoke all prior tax information authorizations on file unless you check the line 5 box and **attach a copy** of the tax information authorization(s) that you want to retain ▶ ☐
To revoke a prior tax information authorization(s) without submitting a new authorization, see the line 5 instructions.**6 Taxpayer signature.** If signed by a corporate officer, partner, guardian, partnership representative (or designated individual, if applicable), executor, receiver, administrator, trustee, or individual other than the taxpayer, I certify that I have the legal authority to execute this form with respect to the tax matters and tax periods shown on line 3 above.▶ **IF NOT COMPLETED, SIGNED, AND DATED, THIS TAX INFORMATION AUTHORIZATION WILL BE RETURNED.**▶ **DON'T SIGN THIS FORM IF IT IS BLANK OR INCOMPLETE.**Client must sign,
print name and date

Signature

Date

Print Name

Title (if applicable)

For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Cat. No. 11596P

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